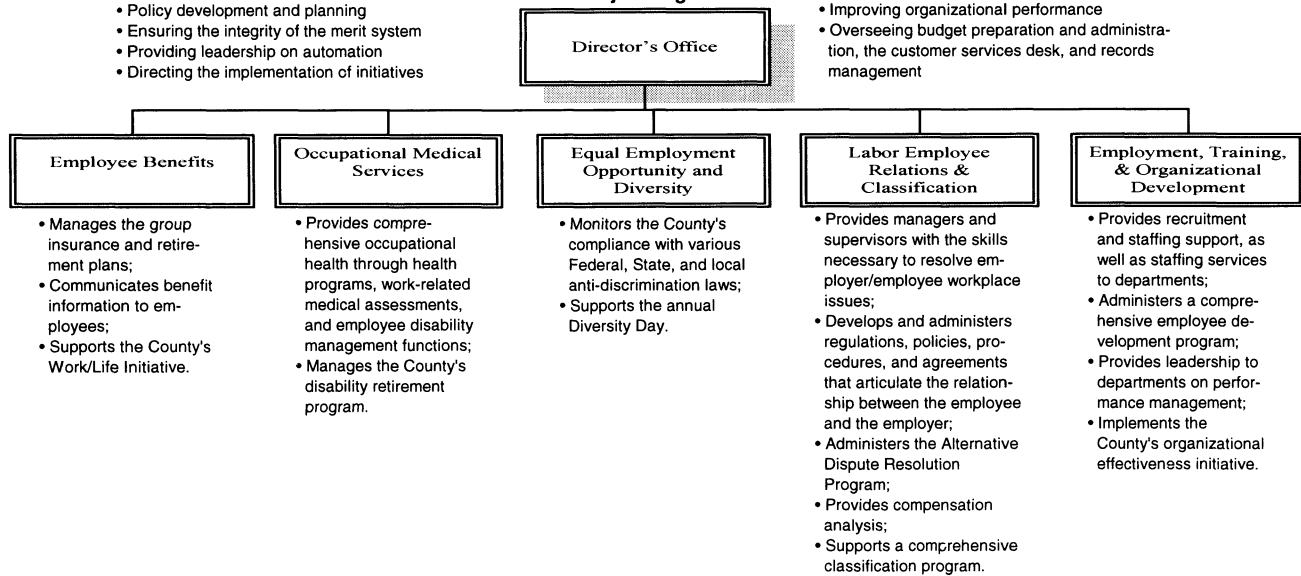### Mission

To provide a proactive and responsive human resources program that attracts, develops, and retains a diverse, high-performing, and well-qualified workforce

Guiding Principles

The Office of Human Resources (OHR) provides high quality services to employees, retirees, and other customers and is a partner to County departments in the management of their human resources. High quality services are ensured through:

- **Emphasizing customer service and stakeholder involvement**
- **Streamlining and simplifying Human Resources regulations and procedures**
- **Developing and applying automated Human Resources systems and procedures**

- **Increasing and fully utilizing workforce diversity**
- **Maintaining labor-management collaboration**
- **Providing training and information to managers for better management of their human resources**
- **Ensuring human resources capacity to meet current and future needs**

Major Programs

- Policy development and planning
- Ensuring the integrity of the merit system
- Providing leadership on automation
- Directing the implementation of initiatives

Director's Office

- Improving organizational performance
- Overseeing budget preparation and administration, the customer services desk, and records management

Employee Benefits
- Manages the group insurance and retirement plans;
- Communicates benefit information to employees;
- Supports the County's Work/Life Initiative.

Occupational Medical Services
- Provides comprehensive occupational health through health programs, work-related medical assessments, and employee disability management functions;
- Manages the County's disability retirement program.

Equal Employment Opportunity and Diversity
- Monitors the County's compliance with various Federal, State, and local anti-discrimination laws;
- Supports the annual Diversity Day.

Labor Employee Relations & Classification
- Provides managers and supervisors with the skills necessary to resolve employer/employee workplace issues;
- Develops and administers regulations, policies, procedures, and agreements that articulate the relationship between the employee and the employer;
- Administers the Alternative Dispute Resolution Program;
- Provides compensation analysis;
- Supports a comprehensive classification program.

Employment, Training, & Organizational Development
- Provides recruitment and staffing support, as well as staffing services to departments;
- Administers a comprehensive employee development program;
- Provides leadership to departments on performance management;
- Implements the County's organizational effectiveness initiative.

The Office of Human Resource's customer base is comprised of almost 30,000 persons, including all collective bargaining, non-represented, temporary, and appointed employees. This encompasses active employees, retirees and their survivors, as well as dependents of active employees who rely upon County health benefits. With a myriad of services provided to such a diverse customer base, it is important to ensure that all facets of human resource services are provided at the highest quality level. If our service delivery standards are maintained, the outcomes of OHR's mission will be achieved.

Feedback from our customers and from monitoring our workforce provides information on how effective we are in achieving our mission and how well we are abiding by our guiding principles. The Office must also be cognizant of the resources (staff and funding) needed to ensure our productivity and service value. "Cost per consumer" and "human resource staff per consumer" provide an initial macro view of cost containment and service delivery. For FY03, the cost per consumer for human resource services was $835[a] and the ratio of human resource staff to customers was 1:122.[b]

DEPARTMENTAL OUTCOMES	FY01 ACTUAL	FY02 ACTUAL	FY03 ACTUAL	FY04 BUDGET	FY04 ACTUAL	FY05 APPROVED
Employee turnover as a percentage of total workforce[c]	6.0	6.0	6.1	6.2	NA	6.1
Percentage of workforce provided training in technical and professional skills in a given year[d]	35.3	45.0	43.5	35.3	35.3	35.0
Average employee length of service (years)[c]	12.0	12.0	10.0	10.5	11.2	10.5
Average employee absenteeism per year (sick leave hours)[e]	75.6	74.2	76.4	73.0	73.0	73.0
Percentage that average pay increase is above (below) the CPI[c,f]	3.3	4.1	4.0	4.0	3.7	4.2
Percentage of minorities in the County workforce vs. the percentage in the County population (ratio)[g]	1.017:1	1.039:1	0.987:1	1.040:1	1.200:1	1.040:1
Percentage of employees satisfied with compensation and benefits	NA	97.8	98.0	98.0	98.0	98.0
Percentage of managers reporting satisfaction with human resources services	NA	NA	NA	NA	NA	TBD

Notes:

[a] Includes active employees, retirees, and survivors.

[b] Includes all professional, administrative, and support staff.

[c] Based upon the calendar year (FY01 = CY01).

[d] Includes participation in the Tuition Assistance program, Leadership Institute, computer and professional development training. Workforce excludes temporary employees, elected and appointed officials, paid members of boards and commissions, and judicial branch employees.

[e] Excludes temporary employees, elected and appointed officials, paid members of boards and commissions, and judicial branch employees. The target for sick leave hours taken as established through the County's human resources data clearinghouse provider is between 63.2 (8 hour work day) and 79 (10 hour work day) hours per calendar year. As shown above, sick leave hours in the County fall between these anticipated levels.

[f] Includes the general wage adjustment and performance increment.

[g] This measure indicates the extent to which the Executive Branch workforce is representative of the community it serves.

HUMAN RESOURCES

PROGRAM:	PROGRAM ELEMENT:
Administration	Records Management

PROGRAM MISSION:
To process County personnel actions and maintain employee and retiree records through a centralized personnel data and records administration program that ensures data integrity, accuracy, timeliness, and compliance with personnel policies and requirements

COMMUNITY OUTCOMES SUPPORTED:
• Deliver high value services for tax dollars
• Ensure the confidentiality of personal information
• Provide responsive, accessible government services and information

PROGRAM MEASURES	FY01 ACTUAL	FY02 ACTUAL	FY03 ACTUAL	FY04 BUDGET	FY04 ACTUAL	FY05 APPROVED
Outcomes/Results:						
Number of exceptions found in semi-annual salary record audit by outside auditor	0	0	0	0	0	0
Service Quality:						
Average daily number of records with personnel action data entry errors identified in daily edit reports[a,b]	NA	NA	0.80	0.50	0.50	0.50
Average daily percentage of records with personnel actions processed accurately[b]	NA	NA	99.90	99.90	99.90	99.90
Percentage of personnel transactions processed within 10 days of the effective date of the personnel action	NA	99.99	100.00	100.00	100.00	100.00
Percentage of records in compliance with personnel policies and requirements (based on audit sample)	NA	99.99	100.00	100.00	100.00	100.00
Efficiency:						
Average cost per personnel transaction processed ($)	NA	NA	11.95	13.41	15.68	12.18
Personnel actions processed per workyear[e]	NA	NA	4,633	4,500	5,124	6,333
Outputs/Workload:						
Number of County personnel files (actives and retirees)	29,709	[d]39,281	42,376	41,000	47,836	44,000
Number of Personnel Action Forms (PAFs) processed annually	NA	NA	11,194	11,000	4,762	9,000
Number of Personnel Data Forms (PDFs) processed annually	NA	NA	5,718	5,500	3,283	5,000
Number of tax forms processed annually	NA	NA	6,252	6,000	4,628	5,000
Number of vendor payments processed	NA	1,800	1,971	2,000	1,840	2,000
Number of documents imaged into employee or retiree files	NA	175,297	186,630	175,500	141,505	150,000
Number of employment verifications conducted	2,636	2,257	1,936	2,450	1,776	2,000
Inputs:						
Expenditures ($000)	394	NA	440	364	270	263
Workyears[c]	7.5	7.5	7.3	6.3	4.5	4.5

Notes:
[a]An employee record consists of data entered from personnel action documents - i.e., Personnel Action Form (PAF), Personal Data Form (PDF), or tax forms.

[b]Daily edit reports capture data entered from PAFs, PDFs, tax forms, and miscellaneous data change e-mail requests.

[c]5.0 workyears have been devoted to transaction processing, file maintenance, payment processing, direct customer service, and other duties. About 95 percent of this time is devoted to transaction processing. In FY05, 4.0 workyears will be devoted to transaction processing.

[d]Increase attributed to new imaging record requirements for Recreation temporaries, retirees, COBRA participants, survivors, and outside agency employees.

[e]Includes PAFs, PDFs, and tax forms.

EXPLANATION:
The Records Management program provides centralized personnel transaction processing and records management services to County departments. This unit maintains employee and retiree files, provides verifications of employment, processes payments of invoices for goods and services received by the Office of Human Resources, and provides personnel policy and procedural information and guidance to departments as well as to individual employees, retirees, and other customers.

PROGRAM PARTNERS IN SUPPORT OF OUTCOMES: Department of Finance, Payroll Section; Department of Technology Services; customer departments.

MAJOR RELATED PLANS AND GUIDELINES: Personnel Regulations, Section 2 (Records), and sections governing personnel actions, service increments, leave, etc.; collective bargaining agreements.

PROGRAM:	PROGRAM ELEMENT:
Employee Benefits	Group Insurance Benefit Program

PROGRAM MISSION:
To provide consultation, information, and service to County employees and retirees regarding retirement and group insurance benefits in a manner that ensures an understanding of benefit program provisions and their value

COMMUNITY OUTCOMES SUPPORTED:
- Insisting upon customer satisfaction
- Ensuring high value for tax dollars
- Attracting and retaining a high quality workforce
- Ensuring the confidentiality of personal information
- Empowering and supporting employees

PROGRAM MEASURES	FY01 ACTUAL	FY02 ACTUAL	FY03 ACTUAL	FY04 BUDGET	FY04 ACTUAL	FY05 APPROVED
Outcomes/Results:						
Percentage of employees who understand their health benefits	NA	71	75	75	93	80
Percentage of employees rating heath benefits and services as meeting their needs	NA	83	90	90	99	90
Percentage change in point-of-service plan contribution rates vs. national medical insurance trend[a]	-10.0/+11.0	+38.4/+12.7	+19.4/+10.2	+19.4/+13.5	[e]-0.8/+12.5	+10.0/+10.0
Percentage of new hires who feel that the health benefits package positively influenced their decision to take a County job	NA	72.0	70.0	70.0	NA	75.0
Service Quality:						
Percentage of County employees satisfied with health benefit plans	NA	97	98	98	93	98
Percentage of group insurance changes made correctly during Transfer Season	NA	95	99	99	99	99
Percentage of flexible spending account reimbursements processed within 1 month (non-problem claims)[a]	100	100	100	100	100	100
Average satisfaction rating for group insurance presentations and workshops (1 to 5 scale)	NA	4.5	4.5	4.7	TBD	4.8
Efficiency:						
Group insurance transactions processed per workyear[b]	NA	2,471	3,663	3,378	3,597	3,086
Workload/Outputs:						
Number of active employees participating in County group insurance medical plans[a,c]	7,636	7,731	7,727	7,800	7,762	7,900
Number of retirees participating in County group insurance medical plans[a]	3,245	3,346	3,549	3,700	3,566	3,900
Number of group insurance plans offered (active employees)[a,c]	13	13	13	13	14	16
Number of group insurance transactions processed annually[a,b]	NA	19,519	26,008	25,000	29,135	25,000
Number of group insurance changes processed during Transfer Season	NA	2,297	3,000	3,000	2,487	3,000
Number of presentations and workshops conducted	NA	20	20	20	0	15
Total employee attendance at group insurance presentations and workshops	NA	104	100	120	0	150
Inputs:						
Expenditures ($000)[d]	NA	NA	993	1,183	1,594	1,269
Workyears	NA	7.9	7.1	7.4	8.1	8.1

Notes:

[a]Calendar year data (FY04 = CY04).

[b]Includes transactions processed for Transfer Season, new hires, and status changes.

[c]Active employees include Montgomery County Government employees, as well as those from participating County agencies such as the Housing Opportunities Commission and Montgomery County Cable Television.

[d]Excludes insurance claim expenditures and Records Management and Occupational Medical Services activities charged to the the Employee Benefits Self Insurance Fund.

[e]The national trend has been projected.

EXPLANATION:

The responsibilities of the Group Insurance Benefit Program include:

- Administering the employee insurance benefit program.
- Communicating information on benefit programs to employees, including their value as part of a total compensation philosophy.
- Developing and implementing systems and programs to better meet the needs of employees, and to increase the cost effectiveness and efficiency of benefit delivery systems.
- Maintaining and analyzing data on employee benefit plans and programs needed for strategic decision-making.
- Coordinating and interacting with outside companies, consultants, vendors, hospitals/providers, organizations, etc. on employee benefit plan development, implementation, and administration.

PROGRAM PARTNERS IN SUPPORT OF OUTCOMES: Finance Department, Office of Management and Budget, unions, health and insurance service providers, Montgomery County retirees, actuarial service consultants.

MAJOR RELATED PLANS AND GUIDELINES: Federal and State laws, Montgomery County Code, personnel regulations, collective bargaining agreements.

PROGRAM:	PROGRAM ELEMENT:
Employee Benefits	Retirement Benefit Program

PROGRAM MISSION:
To provide consultation, information, and service to County employees and retirees regarding retirement benefits in a manner that ensures an understanding of benefit program provisions and their value

COMMUNITY OUTCOMES SUPPORTED:
• Insisting upon customer satisfaction
• Ensuring high value for tax dollars
• Attracting and retaining a high quality workforce
• Ensuring the confidentiality of personal information
• Empowering and supporting employees

PROGRAM MEASURES	FY01 ACTUAL	FY02 ACTUAL	FY03 ACTUAL	FY04 BUDGET	FY04 ACTUAL	FY05 APPROVED
Outcomes/Results:						
Percentage of employees who understand their retirement benefits before the first retirement counseling session[a]	NA	NA	82.0	85.0	89.3	90.0
Percentage of employees who understand their retirement benefits after retirement counseling session(s)[a]	NA	NA	100.0	98.0	100.0	98.0
Service Quality:						
Percentage of retirees who receive their retirement check within 30 days of signing their retirement application and selecting a payment option[a]	NA	NA	NA	90.0	NA	90.0
Average satisfaction rating for the retirement process post-counseling session (scale = 1 to 5)[a]	NA	NA	4.0	4.0	4.2	4.0
Average satisfaction rating for retirement presentations and workshops (scale = 1 to 5)[a]	NA	NA	NA	4.0	4.6	4.5
Efficiency:						
Number of active employees per workyear[b]	NA	NA	NA	1,599	1,567	1,837
Workload/Outputs:						
Number of active employees in County retirement plans[b]	NA	NA	NA	8,793	8,621	9,000
Number of retirements processed[a]	NA	NA	217	250	237	250
Number of deferred compensation contribution changes, catchups, and hardship withdrawals processed	NA	NA	4,200	4,200	761	2,300
Number of presentations and workshops conducted[a]	NA	NA	NA	10	11	10
Total employee attendance at retirement presentations and workshops[a]	NA	NA	NA	160	176	120
Number of retirement counseling sessions conducted by staff[a]	NA	NA	660	700	590	700
Inputs:						
Expenditures ($000)[c]	NA	NA	991	1,048	938	938
Workyears	NA	5.4	6.3	5.5	5.5	4.9

Notes:

[a]Includes only active employees in the Employees' Retirement System (ERS). These measures are used by the Benefits Team to determine the effectiveness of retirement training sessions and of counseling sessions.

[b]Active employees include Montgomery County Government employees, as well as those from participating County agencies such as the Montgomery County Revenue Authority, the Housing Opportunities Commission, the independent fire/rescue corporations, and Strathmore Hall Foundation Inc.

[c]Excludes insurance claim expenditures and Records Management and Occupational Medical Services activities charged to the Employees' Retirement System Pension Trust, the Employees' Retirement Savings Plan Pension Trust, and the Compensation and Employee Benefits Adjustments Non-Departmental Account.

EXPLANATION:
Montgomery County sponsors two separate pension plans - the Employees' Retirement System or ERS and the Employees' Retirement Savings Plan or RSP. The ERS is a cost-sharing defined benefit pension. This plan is closed to employees hired on or after October 1, 1994, except for public safety bargaining unit employees. The RSP is a defined contribution plan. This plan is for all non-public safety and certain public safety (non-bargaining unit) employees hired on or after October 1, 1994. The responsibilities of the Retirement Benefit Program to support these plans include:

 - Administering the employee retirement benefit programs;
 - Communicating information on benefit programs to employees, including their value as part of a total compensation philosophy;
 - Developing and implementing benefit systems and programs to better serve employees, and to increase the effectiveness and efficiency of benefit delivery systems;
 - Maintaining and analyzing data on employee benefit plans and programs needed for strategic decision-making;
 - Coordinating and interacting with outside companies, consultants, vendors, hospitals/providers, organizations, etc. on employee benefit plan development, implementation, and administration; and
 - Coordinating investment counseling sessions to help employees manage their benefits in an informed manner.

PROGRAM PARTNERS IN SUPPORT OF OUTCOMES: Board of Investment Trustees, County Attorney's Office, Finance Department, Office of Management and Budget, unions, third party providers, Montgomery County retirees, actuarial service consultants.

MAJOR RELATED PLANS AND GUIDELINES: Federal and State laws, Montgomery County Code, Montgomery County Personnel Regulations, collective bargaining agreements.

HUMAN RESOURCES

PROGRAM:	PROGRAM ELEMENT:
Employment, Training, and Organizational Development	Employment

PROGRAM MISSION:
To attract and recruit candidates for County departments and agencies that result in a well-qualified and diverse employment pool

COMMUNITY OUTCOMES SUPPORTED:
• Attraction and retention of a quality County workforce
• Appreciation of diversity
• Efficient, effective, and responsive government
• Delivery of quality services

PROGRAM MEASURES	FY01 ACTUAL	FY02 ACTUAL	FY03 ACTUAL	FY04 BUDGET	FY04 ACTUAL	FY05 APPROVED
Outcomes/Results:						
Average satisfaction of departments with the candidate pool (scale: 1 to 5)	NA	4.0	4.0	4.2	4.2	4.2
Percentage of candidate pool meeting minimum qualifications	60.0	59.0	58.0	65.0	78.0	65.0
Percentage of minorities[a] in workforce vs. the percentage of minorities in the County population (ratio)[b]	1.017:1	1.039:1	0.987:1	1.040:1	1.200:1	1.040:1
Percentage of under-represented County job groups in which the representation of females has increased from the previous year[c]	70.0	50.0	50.0	70.0	TBD	60.0
Percentage of under-represented County job groups in which the representation of minorities has increased from the previous year[c]	62.5	77.7	70.0	70.0	TBD	60.0
Service Quality:						
Average time to fill a vacant position (days)[d]	73	62	60	55	110	100
Average time to produce an eligibility list (days)[e]	29	18	3	12	26	25
Average time to assess minimum qualifications (days)[f]	9	6	12	5	11	10
Efficiency:						
Applications processed per workyear	1,652	1,540	1,495	2,333	2,430	3,182
Percentage of new hires obtained through Internet referral[g]	NA	29	25	55	43	55
Outputs/Workload:						
Number of applications received and rated for advertised positions	21,317	19,560	18,394	35,000	26,731	35,000
Number of new hires - permanent full-time and part-time merit positions[h]	1,476	NA	NA	NA	497	600
Number of new hires - temporary positions[h]	NA	NA	NA	NA	1,218	1,275
Total number of new hires[h]	NA	2,125	1,485	2,000	1,715	1,875
Number of job announcements published	580	[i]221	222	500	498	220
Average number of applications received per posted job announcement	37	89	83	100	54	100
Number of examinations administered	NA	[i]2,722	2,649	3,500	2,701	3,500
Number of new examinations developed[i]	NA	17	19	20	19	20
Number of job fairs and outreach programs	22	29	21	15	14	11
Inputs:						
Expenditures ($000)	1,042	NA	1,203	1,584	1,500	1,306
Workyears	12.9	12.7	12.3	15.0	11.0	11.0

Notes:

[a]Minorities are defined to include African Americans, Hispanics, Asians, and Native Americans.

[b]This measure shows the extent to which the Executive Branch workforce is representative of the community it serves. The EEO Team produces annual reports for each department providing them with information on their diversity profile. The Staffing and Organizational Development Team assists departments in enhancing their diversity profile.

[c]County employees belong to one of 19 job groups (Officials and Administrators, Professionals, Technicians, Paraprofessionals, etc.). Under-representation is said to exist when the percentage of County employees in a particular job group who are female or minorities is significantly less than the percentage of qualified females or minorities available in the corresponding relevant labor force. A difference of more than two standard deviations is considered to be statistically significant, thereby indicating that the difference is due to more than just random chance. The availability of qualified females and minorities is currently based on 1990 Census data. Corresponding data from the 2000 Census will be available early in 2005 and will, in all likelihood, dramatically affect the results for this measure.

[d]Before FY04, this measure was defined as the time from job closing to candidate selection. Beginning with the FY04 actual, this measure reflects the average time from when a candidate *applies* for a position to the date the candidate is actually hired.

[e]Before FY04, the average number of days to produce an eligible list was measured from the time the job announcement closed to the time the eligible list was created. Starting with the FY04 actual, this measure is defined as the average time from when a candidate applies to the date the candidate is placed on an eligible list.

[f]Before FY04, the average number of days to assess minimum qualifications was measured between a job announcement's closing date and the review of minimum qualifications. Starting with the FY04 actual, this measure is calculated from the time the applicant applies to the time the applicant is reviewed for minimum qualifications.

[g]These are persons who applied for the job through the County's website.

[h]The reporting of data on new hires has been refined to better reflect the inclusion or exclusion of temporary hires.

[i]"Examinations" refers to "assembled examinations" such as public safety promotional examinations, multilingual pay differential examinations, etc.

[j]Reflects hiring freeze in effect from December 2001 to July 2002.

EXPLANATION:
The Staffing and Organizational Development Team functions as a strategic partner with County managers to attract, hire, and promote a highly competent and diverse workforce through a program that is efficient, proactive and - to the extent possible - automated. The Team engages in a wide variety of outreach activities designed to ensure quality and diversity in its candidate population, thus ensuring that the County workforce is able to provide quality service and reflects the diversity of the population it serves. The Team is constantly striving to reduce the time it takes to recruit and hire by forging strategic partnerships with departments and agencies and through the use of automation.

PROGRAM PARTNERS IN SUPPORT OF OUTCOMES: County departments and agencies; unions.

MAJOR RELATED PLANS AND GUIDELINES: Montgomery County Code, Montgomery County Personnel Regulations, Administrative Procedures, EEOC Uniform Guidelines for Employee Selection, State and Federal laws, annual EEO and Diversity Action Plan.

HUMAN RESOURCES

PROGRAM:	PROGRAM ELEMENTS:
Employment, Training, and Organizational Development	Training and Organizational Development

PROGRAM MISSION:
To provide a curriculum of study and activities that allow employees to enhance their skills and develop professionally in order to ensure that the County has a well-prepared, well-qualified workforce available to meet current and future needs

COMMUNITY OUTCOMES SUPPORTED:
• Strive for continuous improvement
• Empower and support employees
• Ensure high value for tax dollars

PROGRAM MEASURES[a]	FY01 ACTUAL	FY02 ACTUAL	FY03 ACTUAL	FY04 BUDGET	FY04 ACTUAL	FY05 APPROVED
Outcomes/Results:						
Percentage of trainees applying new training skills within 3 months of receiving training	NA	89	79	92	94	94
Percentage of trainees rating completed training as helpful in their job	NA	97	87	98	94	99
Percentage of trainees rating completed training as helpful to their professional development	NA	95	96	98	94	99
Service Quality:						
Average overall rating of satisfaction with training and development programs (1-5 scale)	NA	4.5	4.5	4.5	4.7	4.5
Average number of days to process a tuition assistance application	NA	10.5	10.0	10.0	7.0	10.0
Efficiency:						
Average cost per County trainee ($)[b]	NA	NA	44.23	41.90	68.39	44.68
Average cost per class ($)[c]	NA	NA	515.09	502.78	526.24	536.11
Average cost per Leadership Institute trainee ($)[d]	NA	NA	495.05	625.00	1,562.50	916.67
Workload/Outputs:						
Number of trainees[b]	4,709	6,705	5,625	5,400	8,815	5,400
Number of courses offered by the County	631	424	483	450	471	450
Number of Leadership Institute graduates	88	55	101	80	32	60
Number of employees participating in the Tuition Assistance Program	638	691	605	650	737	650
Inputs:						
Expenditures - training classes and Tuition Assistance Program ($000)	NA	NA	924	1,012	1,012	1,137
Workyears	NA	3.9	3.9	3.9	3.9	3.9

Notes:
[a]Certain FY01 - FY02 figures have been corrected and/or refined to reflect improvements in recordkeeping and data systems.
[b]Each time an employee participates in training, he or she is counted as a trainee (excludes Tuition Assistance Program participants).
[c]Average cost does not include the cost of County-staffed training on Core Business Systems. However, employees attending these classes are included in the count of trainees.
[d]Leadership Institute cost includes costs for training and the 360 degree feedback instrument.

EXPLANATION:
The Office of Human Resources (OHR) provides support for the personal and professional growth of County employees through a multi-faceted approach that involves a variety of learning opportunities and techniques. Presently this includes centralized employee development services provided by OHR and the tuition assistance program. Training covers such areas as information technology, customer service, professional development, supervisory development, labor/employee relations, benefits, and the Leadership Institute for the Management Leadership Service. At the personal level, employee development is best accomplished through a partnership between managers and employees to identify skills or base knowledge that could be enhanced, and then to choose the most appropriate learning approach. This effort is consistent with Section 33-5 of the County Code that requires management to provide employees with training that is necessary for quality job performance and that also facilitates career advancement.

PROGRAM PARTNERS IN SUPPORT OF OUTCOMES: Department of Techology Services; Office of Procurement; other participating County departments and advisory groups; Montgomery College; Johns Hopkins University; professional technical training consultants.

MAJOR RELATED PLANS AND GUIDELINES: Section 14, Employee Development, Montgomery County Personnel Regulations; Section 33-5 of the County Code (employee development). Parameters for tuition assistance benefits to represented employees are enumerated in the respective collective bargaining agreements.

HUMAN RESOURCES

PROGRAM:	PROGRAM ELEMENT:
Equal Employment Opportunity and Diversity	

PROGRAM MISSION:
To advise, educate, and respond to employees and managers concerning equal employment opportunity and diversity management in order to promote a discrimination free workplace that values diversity

COMMUNITY OUTCOMES SUPPORTED:
• Appreciating diversity
• Promoting equal employment opportunity
• Empowering and supporting employees
• Being open, accessible, and responsive

PROGRAM MEASURES	FY01 ACTUAL	FY02 ACTUAL	FY03 ACTUAL	FY04 BUDGET	FYO4 ACTUAL	FY05 APPROVED
Outcomes/Results:						
Number of discrimination charges filed by County employees with external agencies	11	17	13	20	10	16
Number of discrimination charges filed and handled internally[a]	25	33	33	40	56	50
Percentage of total discrimination complaints filed and handled internally[a]	69.4	66.0	71.7	66.7	84.9	75.0
Number of employees/managers who seek advice from County EEO staff on EEO/diversity matters[b]	46	51	63	75	150	100
Attendance at Diversity Day and other special events	NA	NA	525	700	850	800
Service Quality:						
Number of days needed to develop and issue the EEO and Diversity Action Plan	120	90	90	90	90	90
Average number of days required to complete a discrimination complaint investigation	37	42	69	60	64	60
Average number of days required to mediate a discrimination complaint	NA	21	8	21	14	20
Average satisfaction rating for the mediation process (1-5 scale)	NA	NA	NA	4.4	TBD	4.5
Average satisfaction rating for EEO training (1-5 scale)	4.2	4.4	4.6	4.4	4.5	4.4
Average satisfaction rating for Diversity programs and special events (1-5 scale)[g]	NA	NA	NA	4.4	TBD	4.5
Met all Federal EEO reporting requirements (Yes or No)[c]	Yes	Yes	Yes	Yes	Yes	Yes
Efficiency:						
Average number of discrimination investigations completed per workyear[d]	36	48	46	54	66	66
Number of mediations conducted per workyear	0	2	1	6	2	10
Number of diversity programs and special events conducted per workyear[f]	20	NA	3	6	5	60
Workload/Outputs:						
Number of discrimination complaints investigated	36	48	46	[g]54	66	60
Number of mediations conducted	0	2	1	6	2	10
Number of employees/managers trained on EEO matters	255	350	165	[h]600	[h]771	[i]300
Number of EEO training sessions conducted	4	5	10	20	18	6
Number of diversity programs and special events conducted[g]	20	5	3	6	5	6
EEO and Diversity Action Plan issued (Yes or No)[e]	Yes	Yes	Yes	Yes	Yes	Yes
Inputs:						
Expenditures ($000)	NA	269	296	376	365	366
Workyears	3.9	3.9	3.4	3.9	3.5	4.0

Notes:

[a]An indication of program success is the extent to which individuals elect to resolve their complaints internally with the EEO and Diversity Management Team, rather than filing charges with an external Fair Employment Practices Agency such as the Commission on Human Rights or the U.S. Equal Employment Opportunity Commission. Filing complaints internally demonstrates confidence and satisfaction with the County's EEO Compliance and Diversity Management program.

[b]This outcome reflects program success by showing the extent to which employees and managers (increasingly) seek advice and guidance from the County's EEO and Diversity Management Team.

[c]The EEO and Diversity Management Team is responsible for submitting bi-annual workforce composition reports to the U.S. Equal Employment Opportunity Commission, and EEO/Affirmative Action reports to the U.S. Department of Justice in support of Federal grants that the County receives.

[d]This number reflects a work effort of 1.0 workyears, as performed by two professional positions.

[e]The EEO and Diversity Management Team produces an annual EEO and Diversity Action Plan in the first quarter of every fiscal year. The Plan provides an analysis of the Executive Branch workforce and the EEO/diversity accomplishments for the preceding year, as well as EEO/diversity recruitment strategies and objectives for the prospective year. There are no externally imposed deadlines on this product.

[f]Beginning in FY03, the Work/Life component is no longer a part of the EEO Compliance and Diversity Management program.

[g]This increase is projected as a result of the heightened awareness created by training.

[h]Mandatory EEO compliance training was developed and implemented for all County supervisors and managers in FY04.

[i]Represents residual mandatory EEO Compliance training for all County managers and supervisors, as well as mandatory Workplace Harassment Training for all new employees.

EXPLANATION:
The EEO and Diversity Management Team consists of the EEO Compliance and the Diversity sections. The Compliance function develops, implements, and enforces policies that are consistent with Federal, State, and local anti-discrimination laws. The services of the Compliance unit include EEO complaint processing and investigation, mediation, consulting, and training. In addition, the Compliance unit maintains EEO/affirmative action statistics in order to advise management and comply with Federal reporting requirements. The Diversity Management component develops and administers programs to promote diversity in the County workforce. Its services include providing staff support to the Montgomery County Diversity Council, coordinating Diversity Day and other special events, as well as developing and implementing initiatives in support of diversity programs.

PROGRAM PARTNERS IN SUPPORT OF OUTCOMES: Diversity Council, unions, Montgomery County employee associations and organizations, Montgomery County Commission on Human Rights, County Executive's Office of Community Outreach, County Attorney's Office, ADA Task Force, Commission on Persons with Disabilities, Montgomery County departments and agencies.

MAJOR RELATED PLANS AND GUIDELINES: EEO Complaint Processing Guidelines; Montgomery County Policy on Sexual Harassment; annual EEO and Diversity Acton Plan; Section 4 of the Montgomery County Personnel Regulations; Chapter 27 of the Montgomery County Code on Human Relations and Civil Liberties; Article 49B of the Maryland Annotated Code; Title VII of the Civil Rights Act of 1964, as amended; Equal Pay Act; Americans with Disabilities Act; Age Discrimination in Employment Act.

PROGRAM: Labor Employee Relations and Classification	PROGRAM ELEMENT: Classification

PROGRAM MISSION:
To review and evaluate the duties and responsibilities of individual positions and occupational classes in response to employee, department, and union requests in order to assure that positions are correctly assigned at comparable grade levels

COMMUNITY OUTCOMES SUPPORTED:
• Delivery of quality services
• Attraction and retention of a qualified workforce
• Provision of high value for tax dollars

PROGRAM MEASURES	FY01 ACTUAL	FY02 ACTUAL	FY03 ACTUAL	FY04 BUDGET	FY04 ACTUAL	FY05 APPROVED
Outcomes/Results:						
Individual position reclassification requests as a percentage of the County workforce[a]	1.3	1.5	0.8	0.8	1.0	0.8
Occupational studies conducted as a percentage of total occupations[a]	12.9	11.7	6.0	8.5	3.4	8.5
Service Quality:						
Percentage of occupational studies completed in 12 months	85.0	80.0	75.7	75.0	66.7	75.0
Average time to complete an occupational study (days)	310	314	352	350	320	348
Percentage of individual classification studies completed in 6 months	65.0	90.1	63.5	63.0	54.9	63.0
Average time to complete an individual classification study	174	122	170	168	159	166
- Average time to develop recommendation (days)[b]	122	91	135	134	123	133
- Average time for final approval after initial recommendation (days)	52	31	35	34	36	33
Average time for vacant and new creation classifications (days)	13	4	4	4	4	4
Average overall satisfaction rating by managers regarding the process for conducting occupational studies (1-3 scale)	NA	NA	NA	2.0	NA	2.0
Average overall satisfaction rating by managers regarding the process for conducting individual classification studies (1-3 scale)	NA	2.4	2.3	2.4	2.4	2.4
Efficiency:						
Number of in-house actions processed per workyear[c]	NA	148.3	122.8	143.1	159.1	142.3
Workload/Outputs:						
Number of occupational studies conducted[d]	61	50	37	35	24	35
Number of individual classification studies conducted[d]	99	101	52	65	104	65
Percentage of classification studies conducted in-house	23.1	81.6	76.4	68.0	54.7	68.0
Number of vacant and new position creation classifications conducted	500	381	225	250	259	230
Number of individual positions upgraded	61	57	30	40	51	40
Number of position abolishments	110	104	167	160	206	180
Number of occupational classes reallocated	37	27	18	15	13	15
Number of new classes created	18	13	3	8	7	8
Number of classes abolished	40	[e]60	16	15	15	12
Inputs:						
Expenditures ($000)[f]	NA	NA	448	450	448	541
Workyears[g]	NA	5.7	4.1	3.7	3.7	3.7

Notes:
[a]The low incidence of requests for position reclassifications and the low need for occupational studies show that for the most part, employees are in the proper job classification. Data represents occupational studies accepted.
[b]Measured from the start of the individual classification study.
[c]The workload used as the basis for this measure includes all in-house actions processed by Human Resources staff: individual position review requests, occupational class studies, new and vacant position classifications, class creations and abolishments, and position abolishments. Since the classification workload is handled by professional staff, the Team Manager (0.2 workyears) is excluded from the workyears used to compute this measure.
[d]Represents classification studies accepted in the June and December time periods. Classification studies are conducted by Human Resources staff as well as outside contractors.
[e]The actual number of class abolishments for FY02 includes classes abolished upon creation of Band III for the Management Leadership Service.
[f]Expenditures include personnel costs for Human Resources classification staff and contractual services for classification studies.
[g]Includes the Team Manager (0.2 workyears).

EXPLANATION:
Classification is an integral component of the Office of Human Resources mission and directly affects the ability of the Montgomery County Government to attract and retain competent, qualified employees. The work involves establishing and maintaining the systems and procedures used to differentiate and catalogue the duties, responsibilities, and minimum qualifications of the County's occupational classes. Collectively these occupational classes constitute a formalization of the job worth hierarchy. It is the responsibility of Classification to ensure that there is uniformity and equitable application of job classification across all departments and agencies within the Montgomery County Government and to serve as a functional resource for both employees and management in the structuring of job duties and the development of related organizational structures.

The FY01 data reflect a comprehensive study of Information Technology classifications and compensation, which resulted in a new classification system that collapsed 32 existing job classes into 8 classes. As a result, higher numbers of occupational studies, class abolishments, and class reallocations are shown for FY01. The majority of classification studies during FY01 were conducted by outside contractors. Funds for contractual services were reduced and workyears added to formalize a classification team in FY02 so that a greater percentage of studies could be performed in-house.

During FY03, the compensation function began to transition to the Classification Team, which fully assumed this function in FY04. FY03 results and FY04 projections and results reflect the impacts of this change.

PROGRAM PARTNERS IN SUPPORT OF OUTCOMES: County departments, labor unions, Merit System Protection Board, consultants.

MAJOR RELATED PLANS AND GUIDELINES: Montgomery County Code, Montgomery County Personnel Regulations, collective bargaining agreements, Quantitative Evaluation System (QES) II.

HUMAN RESOURCES

PROGRAM:	PROGRAM ELEMENT:
Labor Employee Relations and Classification	Labor Employee Relations

PROGRAM MISSION:
To support County managers in the areas of collective bargaining and related personnel policies and procedures by negotiating competitive compensation and benefits through collective bargaining and by providing early intervention strategies in workplace disputes in order to enable managers to comply with labor contractual and legal requirements and improve employee labor relations

COMMUNITY OUTCOMES SUPPORTED:
• Healthy and peaceful labor management relations
• Labor and management partnerships based upon trust and mutual respect
• Provision of high value services for tax dollars

PROGRAM MEASURES	FY01 ACTUAL	FY02 ACTUAL	FY03 ACTUAL	FY04 BUDGET	FY04 ACTUAL	FY05 APPROVED
Outcomes/Results:						
Grievances per 100 union employees	1.77	0.45	0.35	0.40	0.72	0.89
Percentage of grievances settled before Chief Administrative Officer (CAO) action[a]	55	23	54	40	56	40
Number of arbitration hearings[a]	11	6	2	5	4	10
Number of Merit System Protection Board cases[b]	8	9	6	8	6	8
Number of unfair labor practice charges filed	3	0	1	2	2	2
Service Quality:						
Average number of days to issue a CAO grievance decision for an administrative proceding[c]	79	78	93	70	97	70
Average number of days to issue a CAO grievance decision for contract grievances[d]	65	77	70	60	52	60
Average overall satisfaction rating for staff-conducted training (scale = 1 to 5)	NA	4.2	4.3	4.2	4.4	4.3
Efficiency:						
Average cost per grievance meeting ($)	NA	1,849	1,842	1,840	1,750	1,840
Average cost per alternative dispute resolution conference ($)	NA	61	60	60	55	60
Workload/Outputs:						
Number of contracts re-negotiated	2	2	1	3	7	3
Number of grievance meetings	94	64	32	60	50	50
Number of alternative dispute resolution conferences	82	59	56	60	73	65
Number of employee mediations	5	8	3	15	0	10
Number of adverse actions processed	140	230	225	250	210	250
Number of employees trained in labor relations and related subjects	NA	604	127	200	120	300
Inputs:						
Expenditures ($000)	896	726	896	751	730	721
Workyears	8.5	8.0	8.0	5.8	5.7	5.6

Notes:

[a]Grievance procedures for bargaining unit employees follow a defined process as outlined in the collective bargaining agreements. The general procedure involves multiple steps and begins with a written grievance by the union to the immediate supervisor. The union may appeal to the department head and finally, to the Chief Administrative Officer (CAO) if a satisfactory response has not been received to the grievance. If the grievance is not settled by the CAO, the union or the employer may refer the matter to arbitration.

[b]Grievance procedures for non-represented employees follow a well-defined process as outlined in Administrative Procedure No. 4-4. The general procedure involves four steps and begins with a written grievance by the employee to the immediate supervisor. The employee may appeal to the department head and to the CAO if no satisfactory response has been received to the grievance. If the grievance is not settled by the CAO, the employee has a final appeal to the Merit System Protection Board.

[c]The standard is 45 days (per Administrative Procedure 4-4).

[d]The standard is 30 days (per general guidance included in various collective bargaining agreements - although some agreements differ).

EXPLANATION:
The Labor Employee Relations Team is the primary point of contact with the County's three employee unions and is responsible for negotiating and administering collective bargaining agreements. The unions representing County employees include the Fraternal Order of Police, the United Food and Commercial Workers, and the International Association of Fire Fighters. These unions collectively represent approximately 5,200 County employees.

The Labor Employee Relations Team administers grievance processes to address employee/management disputes concerning alleged violations of the collective bargaining agreements of the three unions specified above. A grievance process is also administered for unrepresented employees to address disputes arising from alleged violations of the Montgomery County Personnel Regulations. The Team assists departments and agencies with related labor and employee relations issues, reviews proposed adverse and disciplinary actions, develops personnel policies and regulations changes, and oversees bilateral work groups and committees. The Labor Employee Relations Team is also responsible for oversight and administration of the County's policies on compensation.

PROGRAM PARTNERS IN SUPPORT OF OUTCOMES: Labor Relations Policy Committee, Fraternal Order of Police (FOP), International Association of Fire Fighters (IAFF), United Food and Commercial Workers (UFCW), County departments, arbitrators, third party labor administrators, Merit System Protection Board.

MAJOR RELATED PLANS AND GUIDELINES: Labor agreements with the FOP, IAFF, and UFCW; Fair Labor Standards Act; Family Medical Leave Act; State and Federal case law; Executive Regulations for compensation and employee grievance procedures; Chief Administrative Officer guiding principles for labor relations.

PROGRAM: Occupational Medical Services	PROGRAM ELEMENT:

PROGRAM MISSION:
To provide multi-disciplinary occupational medical services, including health promotion, work-related medical and safety hazard assessments, and employee disability management in order to promote the health, wellness, and productivity of the County workforce

COMMUNITY OUTCOMES SUPPORTED:
• Maintaining a healthy workforce
• Empowering and supporting employees
• Delivering quality services
• Ensuring the confidentiality of personal information

PROGRAM MEASURES	FY01 ACTUAL	FY02 ACTUAL	FY03 ACTUAL	FY04 BUDGET	FY04 ACTUAL	FY05 APPROVED
Outcomes/Results:						
Average annual sick leave usage per bargaining unit employee (hours)	84.9	84.3	85.2	83.0	112.0	83.0
Average annual sick leave usage per non-bargaining unit employee (hours)	66.3	64.1	67.5	63.0	89.9	63.0
Percentage of positive substance abuse tests (by employees)[a]	1.0	0.8	1.3	0.5	0.8	0.5
Number of reasonable accommodation and alternative placements made[b]	11	15	13	20	15	20
Service Quality:						
Percentage of total workforce using the Employee Assistance Program (EAP)[c,o]	[i]6.5	[i]7.7	9.2	9.5	8.5	9.5
Percentage of total workforce participating in the wellness program[d]	NA	NA	45.0	45.0	48.0	45.0
Average satisfaction rating for the medical service contract (0 to 4 scale)[j]	4.0	4.0	3.0	4.0	3.5	4.0
Average satisfaction rating for the EAP (0 to 4 scale)	NA	NA	4.0	4.0	4.0	4.0
Average satisfaction rating for the wellness program (0 to 4 scale)	NA	NA	4.0	4.0	4.0	4.0
Efficiency:						
Average cost per EAP user ($)[k]	326.45	289.90	169.52	287.30	162.79	200.00
Average cost per wellness program participant ($)[p]	22.35	22.29	21.10	22.00	28.89	21.00
Average cost per mandated medical screening ($)[e]	118.19	108.01	101.19	120.00	100.56	105.00
Show rate for physical examination appointments (%)[i]	NA	NA	78.0	80.0	86.0	85.0
Workload/Outputs:						
Number of Federally mandated screenings[m]	4,726	4,589	5,774	4,593	5,978	6,000
Number of County mandated screenings	4,518	6,938	7,214	6,456	5,231	6,500
Number of employee substance abuse tests[a]	662	688	672	680	1,057	680
Number of wellness sessions conducted	355	596	453	600	461	600
Number of participants in wellness program[n,o]	8,008	7,914	8,360	9,000	6,106	9,000
Number of Employee Assistance Program users[k]	484	545	837	550	817	600
Number of disability management interventions[f]	327	261	270	295	420	300
Number of medical service encounters[g]	9,244	11,587	11,291	11,500	11,209	11,500
Inputs:						
Expenditures ($000)[h]	2,061	2,400	2,608	2,807	2,790	2,756
Workyears[h]	6.8	7.0	7.0	6.8	6.4	5.4

Notes:

[a]Includes only employees tested for random, post-accident, and reasonable suspicion drug and alcohol tests. No pre-placement screens are reflected.

[b]Includes pre-employment accommodations. Providing accommodations allows continued employment, reduces potential expenditures on disability retirement, and demonstrates commitment to the Americans with Disabilities Act.

[c]The national average for EAP participation is 3 to 5 percent of the total workforce. Participation includes only full-time employees; Police and Fire - Rescue personnel are excluded.

[d]The national average for wellness program participation is 10 to 20 percent of the total workforce.

[e]Only medical services and laboratory contract costs are included.

[f]Disability management includes alternative placement, reasonable accommodation, ergonomic assessments, medical case management, and pre-employment accommodation.

[g]This includes physical examinations, medical testing, medical history reviews, and immunizations. FY02 includes implementation of the Fire/Rescue Wellness Initiative.

[h]Expenditures and workyears include General Fund resources for Occupational Medical Services (OMS) as well as chargebacks to other departments and funds.

[i]Calculated from the actual number of encounters for every department. The encounters include all scheduled exams (e.g. physical exams, including pre-placement and periodic, hearing exam, pulmonary function exam, vision exam, PPD skin testing, PPD reading, vaccinations, neuromuscular testing, etc.). The rate is the percentage of kept appointments. Does not include walk-ins.

[j]Survey participants include Office of Human Resources specialists, department contacts, and employees (upon completion of service by OMS).

[k]May also include significant others (immediate family, blood or marriage, close association) as related to eligible County participants.

[l]This percentage double counts employees that attended multiple services.

[m]Includes mandatory Occupational Safety and Health Agency respiratory evaluation of police officers.

[n]Participants may be counted more than once.

[o]This measure is currently being revised using an improved methodology.

[p]Participants include the recipients of program and resource materials.

EXPLANATION:
Occupational Medical Services (OMS) provides comprehensive medical evaluations to Montgomery County employees to determine their state of health vis-à-vis employment. The evaluations may include Federal, State, and County government mandated screenings. Through screenings and medical evaluations (which can include physical examinations, return-to-work exams, audiometric testing, pulmonary function testing, vision screening, hepatitis B and C screening, fitness for duty evaluations, neuromuscular testing, treadmill stress testing, and comprehensive blood profile testing), OMS is able to provide early identification of health risks and diseases. In addition, OMS ensures equal job opportunities through reasonable accommodation of disabled persons in the workplace. Through the Employee Assistance Program (EAP), Montgomery County employees are offered an opportunity to seek professional counseling on a variety of personal issues including family, work, legal, and alcohol/substance abuse problems that have the potential to interfere with attendance and work performance. A physically and emotionally healthy workforce will reduce on-the-job injuries and potentially reduce health insurance premiums, the use of sick leave, as well as applications for disability retirement. In addition, an EAP can promote employee morale while increasing physical and emotional well-being. The County's wellness program emphasizes education to enable employees to make lifestyle choices that enhance their overall health and wellness. Offerings include exercise classes, back school, weight management programs, and workshops on health issues that impact both men and women.

PROGRAM PARTNERS IN SUPPORT OF OUTCOMES: Contractors for the County's Wellness and Employee Assistance programs, medical and laboratory services, Risk Management Division (Finance Department), County agencies and departments, labor unions.

MAJOR RELATED PLANS AND GUIDELINES: Centers for Disease Control and Prevention, Federal Occupational Safety and Health Administration, Equal Employment Opportunity Commission, National Institute of Occupational Safety and Health, Maryland Workers' Compensation Commission, Americans with Disabilities Act, Federal Drug Free Workplace Act, National Fire Protection Association, Maryland Police Training Commission, Federal Highway Administration, Federal Transportation Administration, State law, Executive regulations, collective bargaining agreements.